



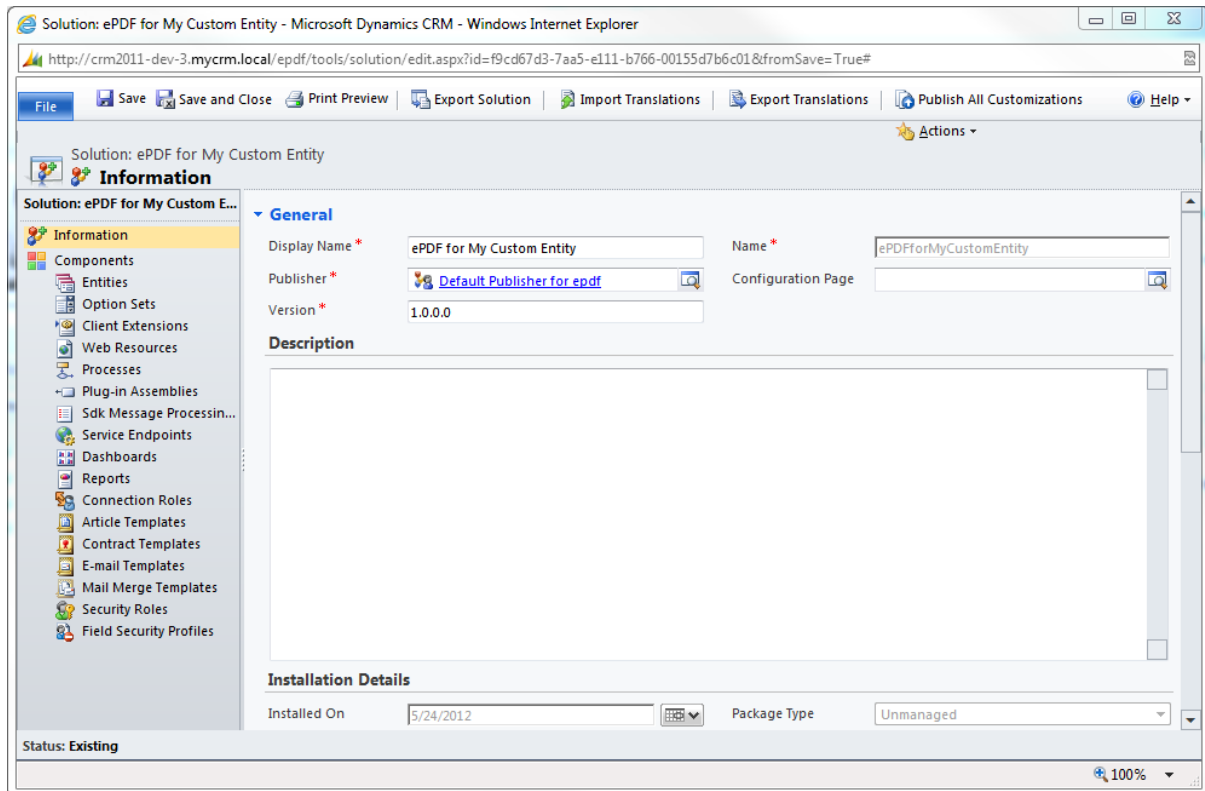
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# ePDF – Custom Entity Installation

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## Step 1 – Export the entity that ePDF is to be installed on

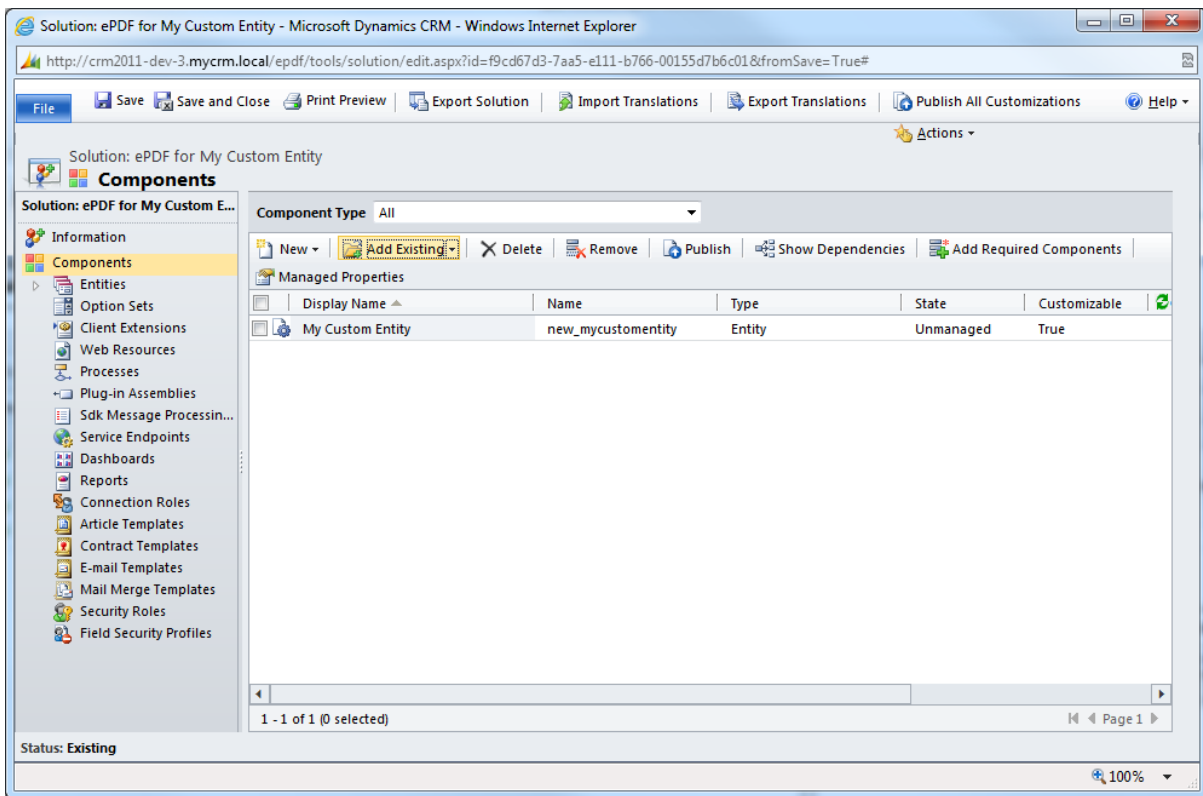
- Go to Settings -> Customizations -> Solutions
- Create a New solution, using something like the following:



The solution name, publisher and version don't really matter for our purposes.



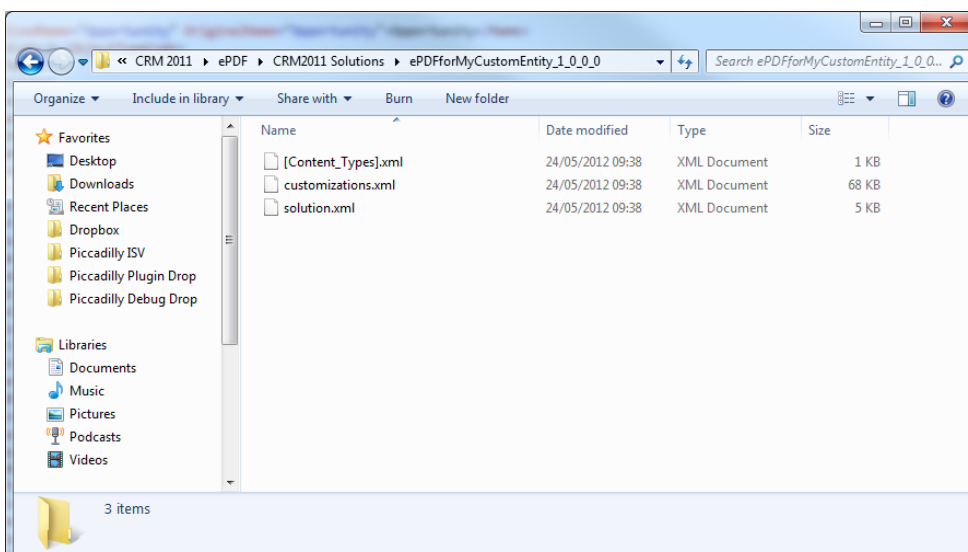
- Add the entity you wish to install ePDF on (Components -> Add Existing -> Entity):



- Export the solution – click next, next, export leaving all options default.
- Save the solution zip file somewhere accessible.

## Step 2 – Extract the solution contents

- Extract the resulting .zip file to a new folder. You should now have three xml files:



- Open **customizations.xml** in your favourite text editor.
- Because we only want to change the entity ribbon settings, we can delete the **EntityInfo**, **FormXml** and **SavedQueries** XML nodes. This means deleting everything inside and including the `<EntityInfo>...</EntityInfo>`, `<FormXml>...</FormXml>` and `<SavedQueries>...</SavedQueries>` tags.
- We can also clear out the EntityRelationships node, as we don't need to change anything there.
- Your **customizations.xml** file should now look something like the following:

```

<ImportExportXml xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <Entities>
    <Entity>
      <Name LocalizedName="My Custom Entity" OriginalName="My Custom
Entity">new_mycustomentity</Name>
      <ObjectTypeCode>10002</ObjectTypeCode>
      <RibbonDiffXml>
        <CustomActions />
        <Templates>
          <RibbonTemplates Id="Mscrm.Templates"></RibbonTemplates>
        </Templates>
        <CommandDefinitions />
        <RuleDefinitions>
          <TabDisplayRules />
          <DisplayRules />
          <EnableRules />
        </RuleDefinitions>
        <LocLabels />
      </RibbonDiffXml>
    </Entity>
  </Entities>
</Roles></Roles>
<Workflows></Workflows>
<FieldSecurityProfiles></FieldSecurityProfiles>
<Templates />
<EntityMaps />
<OrganizationSettings />
<optionsets />
<Languages>
  <Language>1033</Language>
</Languages>
</ImportExportXml>

```



## Step 3 – Inserting and changing the ePDF Ribbon XML

- Here is the XML required for the ePDF ribbon button:

```

<RibbonDiffXml>
  <CustomActions>
    <CustomAction Id="MyCE.ePDF.#FriendlyName#.CustomAction"
Location="Mscrm.Form.#EntityName#.MainTab.ExportData.Controls._children"
Sequence="40">
      <CommandUIDefinition>
        <Button Id="MyCE.ePDF.#FriendlyName#.Button"
Command="MyCE.ePDF.#FriendlyName#.Command"
LabelText="$LocLabels:MyCE.ePDF.#FriendlyName#.LabelText"
ToolTipTitle="$LocLabels:MyCE.ePDF.#FriendlyName#.LabelText"
ToolTipDescription="$LocLabels:MyCE.ePDF.#FriendlyName#.ToolTip" TemplateAlias="o1"
Image16by16="$webresource:myce_ePDF_button16"
Image32by32="$webresource:myce_ePDF_button32" />
      </CommandUIDefinition>
    </CustomAction>
  </CustomActions>
  <Templates>
    <RibbonTemplates Id="Mscrm.Templates"></RibbonTemplates>
  </Templates>
  <CommandDefinitions>
    <CommandDefinition Id="MyCE.ePDF.#FriendlyName#.Command">
      <EnableRules />
      <DisplayRules />
      <Actions>
        <JavaScriptFunction Library="$webresource:myce_/scripts/epdf.js"
FunctionName="launchEPDF" />
      </Actions>
    </CommandDefinition>
  </CommandDefinitions>
  <RuleDefinitions>
    <TabDisplayRules />
    <DisplayRules />
    <EnableRules />
  </RuleDefinitions>
  <LocLabels>
    <LocLabel Id="MyCE.ePDF.#FriendlyName#.ToolTip">
      <Titles>
        <Title languagecode="1033" description="Create PDF Report for Notes
attachment, Email or Saving to disk" />
      </Titles>
    </LocLabel>
    <LocLabel Id="MyCE.ePDF.#FriendlyName#.LabelText">
      <Titles>
        <Title languagecode="1033" description="Create PDF Report" />
      </Titles>
    </LocLabel>
  </LocLabels>
</RibbonDiffXml>

```

- You should replace all instances of **#FriendlyName#** with a describing name for your entity eg. **MyCustomEntity**. Do not use spaces.
- You should replace **#EntityName#** with the system name for your entity, in this case **new\_mycustomentity**.



- Once the find/replaces are complete, you should copy and paste the ePDF ribbon XML and replace the <RibbonDiffXml> node in your solution's **customizations.xml** file. In this example, the final **customizations.xml** file would look as follows:

```

<ImportExportXml xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <Entities>
    <Entity>
      <Name LocalizedName="My Custom Entity" OriginalName="My Custom
Entity">new_mycustomentity</Name>
      <ObjectTypeCode>10002</ObjectTypeCode>
      <RibbonDiffXml>
        <CustomActions>
          <CustomAction Id="MyCE.ePDF.MyCustomEntity.CustomAction"
Location="Mscrm.Form.new_mycustomentity.MainTab.ExportData.Controls._children"
Sequence="40">
            <CommandUIDefinition>
              <Button Id="MyCE.ePDF.MyCustomEntity.Button"
Command="MyCE.ePDF.MyCustomEntity.Command"
LabelText="$LocLabels:MyCE.ePDF.MyCustomEntity.LabelText"
ToolTipTitle="$LocLabels:MyCE.ePDF.MyCustomEntity.LabelText"
ToolTipDescription="$LocLabels:MyCE.ePDF.MyCustomEntity.ToolTip" TemplateAlias="o1"
Image16by16="$webresource:myce_ePDF_button16"
Image32by32="$webresource:myce_ePDF_button32" />
            </CommandUIDefinition>
          </CustomAction>
        </CustomActions>
        <Templates>
          <RibbonTemplates Id="Mscrm.Templates"></RibbonTemplates>
        </Templates>
        <CommandDefinitions>
          <CommandDefinition Id="MyCE.ePDF.MyCustomEntity.Command">
            <EnableRules />
            <DisplayRules />
            <Actions>
              <Url Address="$webresource:myce_/ePDF.html" PassParams="true"
WinMode="1" WinParams="dialogWidth:400px;dialogHeight:215px"></Url>
              <JavaScriptFunction Library="$webresource:myce_/scripts/epdf.js"
FunctionName="launchEPDF" />
            </Actions>
          </CommandDefinition>
        </CommandDefinitions>
        <RuleDefinitions>
          <TabDisplayRules />
          <DisplayRules />
          <EnableRules />
        </RuleDefinitions>
        <LocLabels>
          <LocLabel Id="MyCE.ePDF.MyCustomEntity.ToolTip">
            <Titles>
              <Title languagecode="1033" description="Create PDF Report for Notes
attachment, Email or Saving to disk" />
            </Titles>
          </LocLabel>
          <LocLabel Id="MyCE.ePDF.MyCustomEntity.LabelText">
            <Titles>
              <Title languagecode="1033" description="Create PDF Report" />
            </Titles>
          </LocLabel>
        </LocLabels>
      </RibbonDiffXml>
    </Entity>
  </Entities>
</ImportExportXml>

```

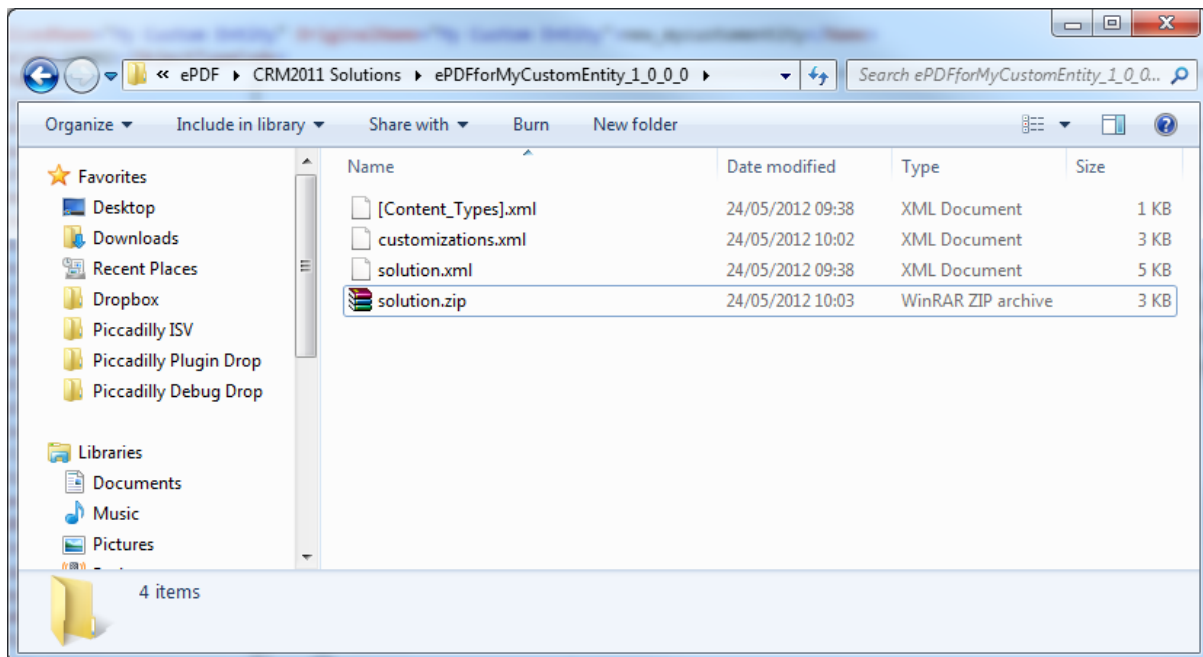


```

</Entity>
</Entities>
<Roles></Roles>
<Workflows></Workflows>
<FieldSecurityProfiles></FieldSecurityProfiles>
<Templates />
<EntityMaps />
<OrganizationSettings />
<optionsets />
<Languages>
  <Language>1033</Language>
</Languages>
</ImportExportXml>
    
```

## Step 4 – Re-import the solution

- Save the **customizations.xml** file.
- Zip up the three solution files into a new solution zip:



- In CRM, import the solution using all default settings.
- The import should complete successfully. If not, you can save the import log file to get a better idea of what went wrong.
- Once the solution is imported, you must **Publish all Customizations**.
- Your custom entity should now have the ePDF button.
- You may delete the new solution from CRM as it is no longer needed. The ePDF button will remain.



## Removing ePDF from the custom entity

If you wish to remove the ePDF ribbon button from the custom entity after using the above instructions, please follow the following steps:

- If you still have the unzipped solution files, you can use those to create a new solution for uninstallation.
- If not, please follow Step 1 of the installation instructions above to produce a new solution containing your custom entity.
- Open the **customizations.xml** file in a text editor.
- Replace the entire `<RibbonDiffXml>` node with the following xml:

```
<RibbonDiffXml>
  <CustomActions />
  <Templates>
    <RibbonTemplates Id="Mscrm.Templates"></RibbonTemplates>
  </Templates>
  <CommandDefinitions />
  <RuleDefinitions>
    <TabDisplayRules />
    <DisplayRules />
    <EnableRules />
  </RuleDefinitions>
  <LocLabels />
</RibbonDiffXml>
```

- Save the **customizations.xml** file.
- Zip up and import the solution as per Step 4 of the installation instructions. Make sure you Publish all Customizations, and you may delete the solution thereafter.

